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Introduction

Expedient software supports the Customs, Forwarding, Logistics industry. This document aims to assist new users navigate through the system. Various Icons, Symbols which are prevalent throughout the system will be highlighted in this document with an explanation of what each performs.

Please Note: Expedient Recommends using Adobe PDF Reader. To get the best results in viewing Expedient User Manuals, turn the Bookmarks Navigation on to see the Bookmarks for each topic Heading. See below:

Once this is set, then click on the below:

See below:
Logging In

The Web Address to the Expedient Web Application will be provided to you by your Manager or Application Superuser. Once you have navigated to the Web Address, the Expedient landing page will appear as below.

Please type in your Web Login Email and Password to access the main menu.

How to Sign In

1. Enter your Web Login Email in the Email Address field
2. Type in your Password in the Password field
3. Click the Sign In button.
4. Your Web Browser may ask for permission to store your login credentials. Saving the credentials will allow for easier subsequent Sign In attempts but may compromise your User account security.
5. If your login details were correct, you will be directed to the Main Menu
Getting your Web Login

Please contact your Manager or a user with Super User Permissions they will be the only individuals who can assign your Web Login Email. This is performed in the Users Masterfile and is described in the Administrator User Manual.

Forgotten Passwords

Expedient has provided a reset password feature if you happen to forget your password. Please follow the steps below to reset your password:

1. Click on the Forgot Password link

2. You will be navigated to the Reset Your Password Page

3. In the Email Address Field, type in the Web Login Email Address.

4. Click the Reset Your Password button.

5. The System will automatically send you an Email. Please allow 5mins before checking your Inbox folder.
   - If you don’t receive the Email in your Inbox, please check your Junk folder or contact your Application superuser to confirm if you have been granted access.

6. Click on the link provided on the Email.

7. Your Web browser will navigate you to the New Password page. Type in your new password.

8. Click the Submit button
Main Menu Page

Once you have successfully logged in, you will be presented with the Expedient Main Menu. This screen will vary based on the Modules your company has subscribed to. The screen is divided into four sections. See below screen captures of highlighted sections.

1. Main Menu
2. Search Bar
3. Side Bar
4. Recent Items List
5. Favourites
6. User Preferences
Main Menu

The menu structure is based off the windows tree view. Each Menu item with a folder icon can be collapsed to view the sub menus within each menu function. See below:

```
Administration          Management          Workflow          Order Management

- Finance
  - KPI - Management Dashboard
  - Job - Financial Enquiry
  - Client - Profit Enquiry
  - Job - Profit Enquiry
  - Controls
  - Operations
  - User
  - Reports
  - Expedition Management

Forwarding           Customs Processing       Clearance Library      Container Management

Finance              Operational Finance        Rates              Sales

Report Scheduling    Bulk Updates             Audit              Support

Expedit Only
```

Icons

> This symbol represents a folder that contains subfolders/programs that has not been opened.

˅ This symbol represents a folder that contains subfolders/programs that has been opened.

• This symbol represents an input screen, for data entry.

Search Bar

Expedient has provided Users with the ability to quickly find a Screen by using the Search Bar. The Search Bar dynamically presents all screens that match the search term.

![Search Bar](image)

Favourites

This is a customisable list of quick links to reports that you use most often. They can be accessed from the Sidebar. This list is created by clicking on the star button beside the report of interest.
Recent Items
This is a list of quick links to recently used screens and reports.
It appears at the bottom of the main menu page.

User Preferences
Expedient provides users with the ability to customize their experience through the User Preferences Screen.

From this screen a user can:

1. Change their password
2. Switch the application them from light to dark mode.
3. Change their profile icon with an upload image.

Users can access their User Preference Screen by clicking on their Profile icon located on the top right corner of the Main Menu.
Changing your Password

Users can change their Password from the User Preferences screen.

1. Click on the Profile Icon
2. Type in the new password in the “New Password” field
3. Confirm the new password in the “Re-enter Password” field
4. Click Submit

Profile Picture

Users can change their Profile Icon by uploading an image.

1. Click on the profile Icon
2. Click on the upload button

3. The User will have the 2 options to upload a file:
   a. The User can simply drag and drop a file onto the screen
   b. The User can click on the modal to open the Web Browser’s File Dialog box. From the Dialog box, the user can select the file to upload.
**Theme**

Users can switch the colour scheme of their screen by changing between Default and Dark Modes using the Style drop down.

---

**Example of Dark Mode**

![Example of Dark Mode Image](image_url)
Releases

Releases are accessed via the icon at the top of the screen.

This tab displays the most recent Release Notes detailing any recent changes to Expedient. We recommend these are read regularly so you are notified of any changes.

The information is arranged in Notes on each topic. The title of each Note includes the date the change has been made available in Expedient, the area of Expedient affected and a brief description of the change e.g. ‘Release Date 15/07/15 – NZ Import Forwarding – Documents Screen pop up’. This is followed by text with a more expansive description of the change. Click on the Release Note title to view the full Release Note.

The most recently published Release Notes will be shown at the top of the Release Notes list. Any changes available in the next release will be shown at the top of the list for easy reference for coming changes.

After viewing the Release Note click on the Releases button at the top of the Release Notes tab to return to the list of Release Notes.

Search Release Notes by entering the text to search for and click . Expedient will look for the text in all published Release Notes and show the most relevant search at the top of the results.

User Manuals

The user manuals are located under Support on the main page.
The manuals are also available from the screens they relate to under Help or by pushing F1.

This tab displays the User Manuals for Expedient. The manuals are also available from the screens they relate to.

**Dashboard**

If your company has subscribed to this feature, based on your User Masterfile Setup and menu access rights, users can set up graphs based on user-based criteria. These graphs are accessed through the icon at the top of the screen.

**Side Bar**

Each user can utilise multiple screens under a single logon. For example, a user can open the Import Job Registration Screen and search for a job. If they then need to search for a customer in the Customer Masterfile, they can remain in the Import Job Registration Screen and return to the Main Menu and go into the Customer Masterfile and perform a search.

A list of open screens will appear on the Sidebar which is located on the left-hand side of the webpage. Users can switch between the open screens by selecting the desired screen from the Sidebar list. Users can also switch between the screen pressing ALT and Tilde (~) keyboard buttons together.
On laptops, the Sidebar will be hidden by default. A user can click on the expansion button to extend the sidebar. Clicking on the Pin icon will lock the Sidebar in place and prevent it from collapsing during your session. Clicking the Pin icon again will unlock the Sidebar, so it automatically hides.

The list of the User’s Favourite screens can also be accessed from the Sidebar.
Screen Layout

All screens have a consistent look and feel. The toolbars, symbols and shortcut buttons are all consistent on each screen ensuring users gain an understanding and confidence of the system in a short period of time. See the below screen for an explanation of the layout.

The below 7 buttons are standard across all input screens. See below for keyboard shortcuts.
**Finding a Record**

Expedient allows users to search any field within an input screen that has a white background. Fields with grey backgrounds are for display purposes only and cannot be searched. The below table outlines the various use of keystrokes that assist users in searching.

<table>
<thead>
<tr>
<th>Character</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;</td>
<td>Greater than or after a specific date</td>
<td>No. Pkgs &gt;10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Date Reg &gt;01/01/19</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less than or before</td>
<td>No. Pkgs &lt;10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Date Reg &lt;01/01/19</td>
</tr>
<tr>
<td></td>
<td>(pipe)</td>
<td>Used to search two or more variables. Will search for any record with 3 or 6 Packages</td>
</tr>
<tr>
<td>:</td>
<td>Used between two or more variables to specify a range. Will search for records with No.Pkgs between 10 and 15</td>
<td>No. Pkgs 5:10</td>
</tr>
<tr>
<td>*</td>
<td>Used before, after or between a variable to designate a wildcard. Will search for records where customer code starts with SAMP</td>
<td>Cust Code SAMP:</td>
</tr>
<tr>
<td>?</td>
<td>Used before, after or between a variable to designate a single character wildcard</td>
<td>Cust Code IMPORTR</td>
</tr>
<tr>
<td>=</td>
<td>Used to find an empty field. Searches records where No.Pkgs is null</td>
<td>No. Pkgs =</td>
</tr>
<tr>
<td>!=</td>
<td>Used to exclude a variable. Searches records the Consol No is not null</td>
<td>Consol No !=</td>
</tr>
<tr>
<td>!=</td>
<td>Used to exclude a variable. Searches records where No.Pkgs does not equal 15</td>
<td>No. Pkgs !=15</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to</td>
<td>No. Pkgs =&gt;15</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than or equal to</td>
<td>No. Pkgs &lt;=15</td>
</tr>
</tbody>
</table>

**Enter** - Clicking on this button will begin a search of the records for the data you have input.

**Esc** - Clicking on this button will exit search mode
Exiting a Screen

When exiting a screen, you can either click on the Close Button which is located on the right side of the top banner, the Close Button on the Side Bar, or select File >> Exit from the Menu.

Buttons and Shortcuts

The Expedient System allows users to utilise 2 forms of screen navigation, the use of the mouse through buttons, and the use of keyboard via shortcut keys. Button shortcuts use the First Letter of the button where possible.

The below icons highlight each action and shortcut within an input screen.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="add.png" alt="Add Icon" /></td>
<td>Clicking on this button will place users in the input screen in Add Mode. This will allow them to add a new record. i.e.: New Job</td>
<td>A</td>
</tr>
</tbody>
</table>
| ![Update Icon](update.png) | Clicking on this button will place users in the screen in Update Mode. This will allow the user to update the current record.  
This button will only be displayed if a record is displayed on the screen. | U |
| ![Delete Icon](delete.png) | Clicking on this button will Delete the current record displayed on the screen.  
This button will only be displayed if a record is displayed AND you have the authority to delete records. | D |
| ![Find Icon](find.png) | Clicking on this button will Find a record. Users can search for a record by entering data in any field within the screen that is not grey. | F |
| ![Browse Icon](browse.png) | Clicking on this button will Browse the selected records. This allows the user a quick view of the selected records.  
This button will only be displayed if a record is displayed on the screen. | B |
<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
<th>Description</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Move to next field</td>
<td>To navigate to the next input field, the user can click on the field they wish OR use the tab key on the keyboard.</td>
<td>Tab</td>
</tr>
<tr>
<td>Job Class</td>
<td>Pull down Menus</td>
<td>These fields allow you to select from a list of options.</td>
<td></td>
</tr>
<tr>
<td>Date Edit</td>
<td></td>
<td>Clicking on this button will bring up a calendar so the user can select a date</td>
<td></td>
</tr>
<tr>
<td>Detail only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>Insert Line</td>
<td>Allows the User to insert a line where the cursor is currently positioned</td>
<td>F3</td>
</tr>
<tr>
<td>N/A</td>
<td>Delete Line</td>
<td>Allows the User to delete the current line on which the cursor is currently positioned</td>
<td>F2</td>
</tr>
</tbody>
</table>
Accessing Toolbars/Buttons

The toolbars are located on the top of each screen. An example of a toolbar can be seen below:

| File | View | Options | Job Tracking | Order Tracking | Print | Customs | Messaging | Help |

To access these toolbars, you have two choices:

- Using the Mouse
- Simply click on the Toolbar and the options will drop down.

Using the Keyboard

Expedient has provided users with the convenience of Shortcut Keys to certain options on the Toolbar. Within the Pulldown of the Toolbar menus, capital letters will indicate the Command Keys that will open that particular screen.

For example, within the Import Job Registration screen pressing ‘s’ will open the Supplier’s Invoice screen if you are viewing a Job.

<table>
<thead>
<tr>
<th>Customs</th>
<th>Messaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cargo Reporting</td>
<td>C</td>
</tr>
<tr>
<td>Customs Entry</td>
<td>T</td>
</tr>
<tr>
<td>Landed Costing</td>
<td></td>
</tr>
<tr>
<td><strong>Supplier’s Invoice</strong></td>
<td>S</td>
</tr>
<tr>
<td>Unclassified Items</td>
<td></td>
</tr>
<tr>
<td>Underbond Request</td>
<td></td>
</tr>
</tbody>
</table>

Pressing ‘t’ in the Import Job Registration when you are viewing a Job will open the Customs Entry screen.

Similar Command Keys are found in all screens in Expedient. View the Pulldown menus to find out which Command Keys open screens.
Adding/Updating a Record

The Expedient System allows users to input data using either the keyboard or mouse to navigate. When a user clicks on Add/Update (A/U on the keyboard) they will be taken in to Input Mode on the screen. See the below Job Registration screen.

Customer Masterfile Screen

- Blue Border: Current Field
- Red Border: Mandatory Field
Header / Detail Screens

Right Clicking on the column headings will allow users to perform the following:

- Choose the Columns to Display (some screens enforce some fields to always display)
- Reset the Sort Order (double clicking on some column heading will sort the data by that column)
- Adjust Size (this ensures each field fits the relevant line data)
- Reset to Defaults
Field Navigation

The following icons that appear on input/report screens are explained below.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
<th>Description</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Move to next field</td>
<td>To navigate to the next input field, the user can click on the field they wish OR use the tab key on the keyboard.</td>
<td>Tab</td>
</tr>
<tr>
<td></td>
<td>Lookup</td>
<td>Clicking on this button will bring up the relative master file screen in which you can search. For example, if you are not sure what the client code is for a customer, you can perform a lookup and search for the business name.</td>
<td>Ctrl-Z</td>
</tr>
<tr>
<td></td>
<td>Date Edit</td>
<td>Clicking on this button will bring up a calendar so the user can select a date</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Save</td>
<td>Clicking on this button will save the current record</td>
<td>Enter</td>
</tr>
<tr>
<td></td>
<td>Cancel</td>
<td>Clicking on this button will exit input mode for the current record and not save any changes</td>
<td>Esc</td>
</tr>
</tbody>
</table>

Detail only

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
<th>Description</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Insert Line</td>
<td>Allows the User to insert a line above the current line</td>
<td>F1</td>
</tr>
<tr>
<td>N/A</td>
<td>Delete Line</td>
<td>Allows the User to delete the current line</td>
<td>F2</td>
</tr>
<tr>
<td>N/A</td>
<td>Move Lines Down</td>
<td>Allows the User (whilst in the DETAIL section) to move the cursor down to the next block of entries</td>
<td>F3</td>
</tr>
<tr>
<td>N/A</td>
<td>Move Lines Up</td>
<td>Allows the User (whilst in the DETAIL section) to move the cursor up to the next block of entries</td>
<td>F4</td>
</tr>
</tbody>
</table>
Browsing Records

Once users have searched for records within a screen, Expedient provides the ability to browse those records in a summary list format, using the Browse Button located on the Toolbar.

The User can set which fields they want to see each time they use a screen. Right click on the headings to select which columns you wish to see. You can also amend the order of the columns by clicking and dragging a column heading to a new position. See below:

Sort Mode

Click on the Sort Mode button in the Browse screen to enter Sort Mode. The Sort Mode button now becomes the Browse Mode button.

Click on the sliding pointer to adjust the number of records you want to view in the Browse screen.

Click on OK. You may get a warning message if you want to view a large number of records.
Click on Yes or No to remove the warning message. Click on OK to adjust the number of records to match your request. You will now be able to sort the data by clicking on the column headings in the Browse window.

One click on the column header sorts A to Z or numbers ascending. Two clicks on the column header sort Z to A or numbers descending.

**Browse Output to CSV**

You can download the sorted data to a .csv file which you can further manipulate in Excel. Click on ![Output to CSV](Output to CSV) to download the .csv file.
Uploading Documents

Various screens such as the Job Registration, Customer Masterfile contain a Documents tab. Users can use this tab to upload documents related to that Job or Customer.

By clicking the add button,+ the file upload modal will appear.

The User will have the 2 options to upload a file:

1. The User can simply drag and drop a file onto the screen
2. The User can click on the modal to open the Web Browser’s File Dialog box. From the Dialog box, the user can select the file to upload.

Emailing Documents

The Expedient System allows users to email documents from the Printer Menu. The email details are on the right-hand side of the Print screen. If you are producing a document that goes to external contacts and you have set up contacts to receive that document already you may see email addresses in the distribution list. Please refer to the Administration manual for guidance on Documentation Distribution Groups.

Add email addresses by clicking in the first cell of the next blank row in the Recipients table. This provides a pull-down list, so you can select how the email is sent. Click in the next cell for the Cust Code. Search for a customer or enter a customer code.
Double click on the name you want to select. If you need to change the email address or any other details for the contact use the View/Update Personnel button to access the Personnel Contact screen.

**Multiple contacts** can be selected from this screen by holding down the Ctrl key while you are selecting contacts, as shown in the screen shot above. On clicking OK all names selected will be inserted in the Recipient List.

Manually type in an email address by clicking in a blank row in the Address column. Untick the Send? box if you do not want the contact included in the email distribution. Your name will be automatically inserted at the top of the list in blind copy.

Enter the Subject line for the email. If you are producing a document that goes to external contacts the Subject line will show the title of the document and some references for the job or client.

Covering text for the document can be entered in the Body section of the screen.

A default email signature can be added to your User Masterfile so that the same signature automatically appears in every email.

**Attachments and Preview**

The Attachments section shows the documents that will be sent with the email. Highlight the document and use the Print Preview button to view the document before sending. If the print preview does not generate any output, please ensure the Website has “Popup” permissions allowed in the browser’s settings. Further documents can be added to the email by using the Attach Local Docs or Attach Expedient Job Docs buttons. If the Job is linked to a Consol the button is available. The Attach Expedient Consol Docs button opens a screen listing documents attached to the Job. The button opens a screen listing document attached to the Consol.

Select the document you want to attach from the list. The selected document will be added to the Attachments list.
Use \textit{\textbf{X Remove}} to prevent the unwanted attachment going out with the email.

\textbf{Auto Save}

Set the document to save to a shared folder for the job or consol to allow other users to access the document. The document is default set to not save. On the drop-down box, select where you would like to save it.

Select \textit{\textbf{Save to Private Job Docs}} to save the document to folder accessed only by your company or to share the documents in the web portal with your customer. When you are ready to save the document, click \textit{\textbf{Save & Exit}}. Based on the type of document Expedient will save the document to the appropriate Docs folder.

When the Email details are completed use \textit{\textbf{E-mail}} to send the email with attachments or use \textit{\textbf{Print & E-mail}} to produce a hard copy as well as an email.

If the email was generated from either an Import Job Registration or Export Job Registration screen, then the email will be logged in the Events Table. To view the email events users will need to enter this screen via Options in the Job Registration Screen. The below screen will display:
To find out further information on who was sent the email and the Subject of what the document was, then click on the Email Details button. The below screen will appear: